

Rotary District 5500

Requirements for Clubs to be Qualified to Receive Rotary Foundation District or Global Grant Funds

As amended through April 20, 2020

1. **Purpose** - The purpose of Club Qualification is to assure The Rotary Foundation (TRF) and District 5500 that clubs have proper financial and stewardship controls in place to manage successfully grant funds.

2. **Scope and Timeframe** For a Rotary club in D5500 to receive grant funds from the Rotary Foundation, whether the club is the applicant for a District Grant, or is a Host or International Sponsor of a Global Grant, the club must meet requirements to be **Qualified**. There are five requirements outlined in paragraph 3 below. **It is expected that requirements, with the exception of the Club Memorandum of Understanding, must be completed in the Rotary year prior to the year in which the club wants to receive funds.** For example, to receive funds in 2020-21, the club must satisfy the requirements in 2019-20. Clubs must requalify each Rotary Year. (Change April 2020)

3. **Requirements** - District 5500 clubs must satisfy the following requirements to achieve Qualification:
 - 3.1 At least two club members must complete the D5500 Grants Management Seminar (GMS). The expectation is that both participants will complete the training in the Rotary Year prior to the year of the grant funds request. An exception to this rule can be made on a case by case basis as reviewed by the Chair of the D5500 Grants Committee. D5500 Grant Management Seminar is found in the Rotary International website, RI Learning Center, so that it can be accessed at times to meet your needs. (change April, 2020)

 - 3.2 Club must be in “good standing” as defined in Article 3, Section 3.2 of the current District 5500 Bylaws. That is, the Club has no outstanding indebtedness to Rotary

International or to District 5500 exceeding six months, AND, in the preceding Rotary year, the Club President-Elect (or a representative approved by the then District Governor-Elect) attended an approved President-Elect Training Seminar.

3.3 Deleted by DRFC 6/22/17. (Had required a club or member to give to Annual Fund in prior year. This requirement for qualification is no longer permitted per TRF District MOU effective 7/1/17.)

3.4 Club President and the President-Elect serving in the year of the grant funds request must agree to and sign a qualification Memorandum of Understanding (MOU) and submit it to the District Stewardship Chair. The MOU is an agreement between the club and the District and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of grant funds. A copy of the form of MOU will be available on the District 5500 Website for clubs to download and fill in for submission.

3.5 By July 1 of every new Rotary year, the incoming club president must appoint a club Rotary Foundation Chair and report the name and contact information to the Chair of the District Rotary Foundation Committee (DRFC) and to the Stewardship sub-committee Chair of the DRFC. Upon written application and a showing of good cause, the Chair of the DRFC may waive the submission deadline of July 1, provided the president appoint a club Rotary Foundation Chair immediately if a waiver is granted.

4. Primary Contact of Host or International Sponsor Club for a Global Grant must attend a Grant Management Seminar. Though not a requirement for a club to be Qualified, before a Draft application for a Global Grant is started, the Primary Contact in the Sponsor Club must attend and complete a GMS. This need not be done in the prior Rotary year. It must be done before a Draft is started. The requirement that two club members must attend a GMS in the prior year remains.

5. Record Keeping - The District Stewardship Chair shall maintain records verifying Club Qualification.

- 5.1 Records of grant activities, such as application, MOU, correspondence, invoices, reports shall be retained by the club for a minimum of five years after completion of the grant.
- 5.2 Records shall be available to District leaders and club members.
- 5.3 Appropriate action will be taken by the club to provide safe storage and retrieval. Records may be maintained in either electronic or paper form.

6. References

- 5.1 CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING WORKSHEET
<https://www.rotary.org/myrotary/en/document/club-qualification-memorandum-understanding-worksheet>

- 5.2 CLUB MEMORANDUM OF UNDERSTANDING RESOURCES - A GUIDE TO IMPLEMENTING THE CLUB MOU
<https://www.rotary.org/myrotary/en/document/club-memorandum-understanding-resources-guide-implementing-club-mou>

- 5.3 D5500 Bylaws